



## Beneficiary Gift from Your Retirement Plan

Donating all or part of your unused retirement assets, such as your IRA, 401(k), 403(b), pension, or other tax-deferred plan, is an excellent way to make a gift to Regis.

If you designate Regis High School as a beneficiary, Regis benefits from the full value of your gift because your IRA assets will not be taxed at your death.

Gifts of unused retirement assets may provide important tax benefits, including:

- Avoiding potential estate tax on your retirement plan assets
- Permitting your heirs to avoid income tax on retirement assets funded on a pre-tax basis
- Receiving potential tax savings from an estate tax deduction

### How does it work?

- To leave your retirement assets to Regis, **simply request a “change of beneficiary”** form for your retirement plan administrator.
- List Regis High School as beneficiary at the following address:

Regis High School  
55 E. 84<sup>th</sup> Street  
New York, NY 10028  
EIN: # 13-1624155

- Let us know in the Advancement Office so we can thank you for your generosity and properly credit your gift.

We encourage you to consult with your financial advisor.

Please contact the Office of Advancement if you have any questions or need assistance: 212-288-1142 or [giving@regis.org](mailto:giving@regis.org).